

Summary:

Foreign visitors in Norway 2000 - 2011

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The number of foreign tourist arrivals increased from 3.1 millions to nearly 5 million, and number of guest nights increased from 21.3 to 32.6 million. This growth is mainly found in the holiday travel segment. Visiting friends and relatives increased by 88 percent (4.1 million guest nights), while commercial accommodation shows an increase of 33 percent (4.4 million guest nights). While number of arrivals by airplane has more than doubled, arrivals by car increased 43 percent and arrivals by ferry 23 percent.

This analysis is based on data from the annual Foreign Visitor Survey, conducted by the Institute of Transport Economics and financed by Innovation Norway. The survey comprises traffic figures from ferry ports, airports and all major road border crossings and survey data from interviews with approximately 10 000 foreign tourists upon departure from Norway. Main variables are nationality, mode of transport, point of arrival and departure, type of accommodation, season, purpose of visit, length of stay and travel party size. The survey figures do not include people who are travelling to or from work or educational institution.

Table I indicates that the number of arriving tourists spending at least one night in Norway increased by 1.9 million from 2000 to 2011, and that the number of guest nights increased by 11.3 million. The leisure and holiday market is dominating, and shows a higher growth rate than business related travels.

The number of day visitors shows a small growth, while cruise ship tourism is the segment that shows the highest rate of growth.

Table I Foreign visitors in Norway 2000 and 2011. Million arrivals, guest nights, day visitors and cruise ship passengers, and total growth rate 2000 – 2011.

	2000	2011	Growth %
Arrivals, all tourists	3.1	5.0	60
Holiday arrivals	2.3	3.9	66
Business trip arrivals	0.8	1.1	41
Guest nights, all tourists	21.3	32.6	53
Holiday guest nights	17.5	27.3	56
Business trip guest nights	3.9	5.3	36
Day visitors	1.2	1.3	2
Cruise ship passengers	0.2	0.5	120

The summer season (May – September) accounts for 67 percent of the growth in tourist arrivals, however, the growth percentage is lower (58 percent) than in the autumn and winter seasons (83 percent).

The number of tourists arriving by airplane is more than doubled (112 percent), implying that the proportion of airborne tourists has increased from 32.4 to 43.1 percent. The number of tourists arriving by car or bus at road border crossings has increased by 43.3 per cent, and the number of tourists arriving by international ferry connection has increased by 22.8 percent.

The increase in number of Swedish holiday tourist arrivals is higher than for any other country (up 450,000). There is, however, less increase in holiday tourist arrivals from the other traditional nearby markets Denmark, Finland, Germany, Great Britain and the Netherlands (360,000) than from other European countries (550,000).

For guest nights, the increase is larger in absolute figures from “other European countries” (4.47 million) than from the nearby countries, including Sweden (3.336 million). The most important “other European countries” are Poland, France, Italy, Spain, Switzerland and Russia.

Tabell II Foreign holiday visitors in Norway 2000 and 2011. Increase in number of tourist arrivals and guest nights, by nationality. 1000 arrivals/guest nights

	Increase 2000 - 2011 (1000)	
	Arrivals	Guest nights
Sweden	450	2025
Denmark	-17	-341
Finland	70	381
Germany	174	1113
The Netherlands	65	228
Great Britain	66	332
Other European countries	555	4467
Countries outside Europe	177	1650
Total	1540	9855

The growth in number of guest nights between 2000 and 2011 is 87.5 percent in the VFR (visiting friends and relatives) sector, while the growth percentage in commercial accommodation sectors (hotels and similar accommodation, camping, rented cabins) was 33 percent. The commercial sector accounted for an increase of just below 4.4 million guest nights, while the VFR sector increase was 4.1 million guest nights.

It is of particular concern that while the Foreign Visitor Survey substantiate an increase by nearly 4.4 million guest nights in the commercial accommodation sector, the accommodation figures from Statistics Norway show a marginal increase (less than 400,000 guest nights) only. Possible reasons are discussed in this report. Besides the fact that the public accommodation figures do not include small accommodation enterprises (which are quite numerous), there seems to be two possible major explanations:

Firstly, Statistics Norway’s reporting system for guest nights has not caught up with the substantial structural changes in the accommodation sector. The traditional hotel and camping reporting system is not designed for resorts based on lodge villages, apartment hotels etc, organized as for example “multi-ownership tourism accommodation” (MOTA). This implies that accommodation is marketed and sold by agencies outside the control of the traditional hotel operators, and the

responsibilities with regards to who to report what may be quite unclear. The booking agency sector – handling also a large number of private single lodges for rent – is not very well covered by the Statistics Norway. It seems that production of reliable statistics normally depends on the existence of a strong local destination organization.

Another possible explanation is that there may have been an increasing tendency of under-reporting foreign guest nights. While Statistics Norway's figures show an increase of less than 400,000 foreign guest nights (+ 1.3 percent) between 2000 and 2011, it reports an increase of 4.6 million domestic guest nights (+ 27.2 percent) in the commercial sector. This may be an indication, but by no means definite evidence of such under-reporting.